

Scott Montagliani

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My Story

- Proud and outgoing Banker, family man, and personal finance enthusiast with a passion for the business world
- I have supported businesses in the Okanagan, Kootenays, and Northern BC - Returning to Kamloops in 2016
- I have a young family that keeps active in our community of family and great friends, with aspirations to forever deepen our roots in Kamloops, our home
- Accreditations held include the Canadian Securities Course (CSC), Registered Retirement Consultant (RRC) designation, and I am currently a CFA Level II candidate
- Obsessed with entrepreneurship and learning about businesses of all types and across all industries
- Extremely diversified banker, and always active in the Kamloops business world
- I am proud to be a seasoned and trusted professional to friends, colleagues, and local entrepreneurs

Skill Profile

- Diverse banking background spanning 14 years with expertise in Personal, Commercial, and Private Wealth
- Teaching and mentoring, providing effective positive leadership
- Building and maintaining a portfolio of clients
- Positive yet realistic while being honest and straightforward, I have a knack for achieving team engagement
- Financial expertise in both personal and commercial financing and investing strategies
- Lucrative interpersonal and social networking skills that allow me grow my reach and gain COIs
- Presenting recommendations and earning buy-in for internal assessment and external proposals
- Effective at marketing myself and my institution to expand and grow relationships
- Designing and updating financial plans for those in the workforce, entrepreneurs, and retirees
- Strong credit writing and risk analysis skills
- Economically and politically enlightened pertaining to effects on market sectors and industries

EDUCATION

RRC (Registered Retirement Consultant) designation holder	2015
Canadian Institute of Financial Planners	
Canadian Securities Course	2013
Thompson Rivers University	2008-2012
Bachelor of Business Administration Program – Finance Major	

EXPERIENCE

Senior Relationship Manager at BMO **Exceptional 2023 Performance Rating** **2022-2024**

- Analyzing, structuring, and writing credit requests to align with client goals and Bank suitability
- Interpreting financial performance, expectation, and current and projected market conditions
- Managing a portfolio of clients while advising on strategy, operations, financing, share sales and other forms of takeover, along with investment and retirement planning as a unique value add
- Spearheading organizational improvements, leading in piloting new processes

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- Private Banker** at BMO Private Wealth **2020 - 2022**
- Maintain and deepen relationships with existing and prospective High Net Worth clients
 - Structuring and writing personal and business credit requests
 - Host valuable conversations expanding on financial strategies in place and future goals
 - Working closely with the entire Private Wealth team ensuring all clients needs are addressed proactively as it relates to all facets of Banking, Estate, and overall Financial Planning

Commercial Account Manager at BMO **2016-2020**

Associate, Commercial Banking at CIBC **2015-2016**

Financial Advisor - Business at CIBC **2013-2015**

Financial Services Representative at CIBC **2012-2013**

Customer Relations Officer at Business Development Bank of Canada **2011**

Cook at the Coast Canadian Inn, Kamloops **2008-2011**

Bartender at Frick N' Frack (Fog 'n Suds), Kamloops **2008-2011**

Grocery Clerk at Extra Foods Kamloops **2005-2009**

Volunteer Work

- Guest lecturer at various levels including Middle School through University **2015-2021**
- Director for the Oliver and District Heritage Society **2013-2014**
- Kamloops Pit Stops (feeding the local homeless) - Server **2011-2016, 2019**
- Rotar-Act's Community Gardens Program **2011-2012**
- Scholastic Heritage Fair (Kamloops District) **2007, 2008**
- Arthur Hatton track meet - Facilitator **2007**
- Kamloops Youth Soccer Association - Coach **2003-2005**

HOBBIES

- Hockey, golf, softball, and woodworking
- Following current events, politics, and equity markets
- Following major sports leagues and attending games when possible
- Socializing, networking, and maintaining relationships

AWARDS

- Multiple BMO and CIBC awards and recognitions **2012-2020**
- Awarded CFA Level I Entrance Scholarship **2012**
- Top Student - Business studies at Norkam Secondary **2007**
- Provincial Scholarship for Second Language Excellence (Italian) **2008**